NORTEL

CallPilot™

Release 4.0 - Standard 1.05

Desktop Messaging User Guide

for Internet Clients

Updates to the Desktop Messaging User Guides

Business Communications Manager & CallPilot 100/150

Internet Clients

Page 9 Call the sender of a message

Call the sender of a message is not supported.
Contact Sender is not supported. This does not apply to the Instant Messaging feature. To support the Instant Messaging feature, the Contact Sender option must be available.

Page 9 Access web-based My CallPilot to view information and change your feature settings

My CallPilot is not supported. In its place, access to the web-based Mailbox Manager is supported. The My CallPilot field is replaced with the URL for Mailbox Manager.

The Internet mail clients supported are:

- Microsoft Outlook 2007
- Microsoft Outlook 2000
- Microsoft Outlook 2002 (XP)
- Microsoft Outlook 2003
- Window Mail (Vista)

Unified Messaging on BCM supports the following Thin Clients:

- Citrix Metaframe Presentation 4.0 Windows 2003 Server (All editions)
- Citrix Metaframe XP on Windows 2000 Server (All editions) and Windows 2003 Server
- Citrix Metaframe Presentation Server 3.0 on Windows 2003 Server

CallPilot Desktop Messaging does not support Outlook and GroupWise on the same computer.

Page 10 What you need

BCM supported browsers are IE5, IE6, and IE7.
BCM supports Windows Vista Business, Windows Vista Ultimate, and Windows Vista Enterprise. Both 32-bit and 64-bit versions of Windows Vista are supported.

Page 13 CallPilot Player

The Call the sender button is not available.
Contact Sender is not supported.

Page 38 Addressing messages

The Address Book functionality does not function in the same manner as in GroupWise.

Page 56 Linking to My CallPilot

Linking to My CallPilot is not supported. In its place, access to the web-based Mailbox Manager is supported. The My CallPilot field is replaced with the URL for Mailbox Manager.

Outlook, Lotus Notes, GroupWise

Page 9 Contact sender of a message

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Page 10 About this guide

The groupware e-mail clients that are supported are:

- Lotus Notes - 6.0, 6.5, 7.0
- Novell GroupWise - 6.5, 7.0, 7.0.1
- Microsoft Outlook - 2000, 2002 (XP), 2003, 2007

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Page 10 What you need

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Page 13 (Page 12 Lotus Notes) CallPilot Player

The Call the sender button is not available.
Contact Sender is not supported. This does not apply to the Instant Messaging feature. To support the Instant Messaging feature, the Contact Sender option must be available.

Page 13 (Page 12 Lotus Notes) To play a message from your telephone

If your telephone is call forwarded to voicemail, cancel this feature before you access your messages from CallPilot Player.

Page 18 (Page15 Lotus Notes) Composing fax and text messages

On the Compose Fax dialog box you can use the Subject field to add additional information to the fax cover page (for example, the name of the recipient) when you send a fax directly to a fax machine. The maximum length you can enter in the Subject field is 80 characters.

Page 27 Using custom fax Cover Pages

Auto Cover Sheet is not supported.

Page 34 (Page 28 Lotus Notes) Calling the sender of a message

Calling the sender of a message is not supported.
Contact Sender is not supported. This does not apply to the Instant Messaging feature. To support the Instant

Messaging feature, the Contact Sender option must be available.

Page 35 (Page 29 Lotus Notes) Setting message options

Delivery Receipt is not supported.

Page 38 E-mail addresses versus Fax/Telephone numbers

The CallPilot Desktop client always attempts to find a CallPilot e-mail address or address information from Frequent Contacts and other Novell Personal Address books. If the e-mail address field is empty, CallPilot scans the recipient for phone and fax numbers. To send faxes, all other phone number fields must be empty.

Page 45 (Page 34 Lotus Notes and Microsoft Outlook) Personal distribution lists

Distribution Lists (BDL, SDL, PDL) are not supported.

Page 55 Changing audio settings

Admin Restriction of Audio Device is not supported.

Page 56 (Page 40 Lotus Notes and Page 39 Microsoft Outlook) Linking to My CallPilot

My CallPilot is not supported. In its place, access to the web-based Mailbox Manager is supported. The My CallPilot field is replaced with the URL for Mailbox Manager.

Page 56 Note:

CallPilot Player is actually in reference to the Audio Player. Go to **Start>Programs>Nortel>CallPilot>Audio Player**.

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1-800-4 NORTEL
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CallPilot Desktop Messaging User Guide for Internet Clients

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How to get Help

This section explains how to get help for Nortel products and services.

Getting Help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

http://www.nortel.com/support

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, the site enables you to:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting Help over the phone from a Nortel Solutions Center

If you don't find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

http://www.nortel.com/callus

Getting Help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

http://www.nortel.com/erc

Getting Help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

CallPilot* from Nortel is an advanced business communications system that offers exceptional flexibility for managing your messaging needs.

You can work with CallPilot from your telephone or your computer. Desktop Messaging gives you access to your CallPilot mailbox through your Internet e-mail client. Here are some of the many ways you can use CallPilot with your e-mail:

- Listen to voice messages.
- View and print fax messages.
- Record and send voice messages.
- Create and send fax messages, including batch faxes.
- Forward and reply to voice and fax messages.
- Contact the sender of a message.
- Add message options such as urgent and private.
- Add voice, fax, or text file attachments to messages.
- Create personal distribution lists.
- Change your CallPilot password.
- Access web-based My CallPilot to view user information and change your feature settings.

Some features mentioned in this guide may not be available for your CallPilot mailbox. For details, refer to the *Feature availability* topic in the Desktop Messaging online Help, or ask your administrator.

Getting started

About this guide

This user guide is an overview of how to use CallPilot with your Internet e-mail.

The instructions and screen images shown in this guide provide general information for using CallPilot with your e-mail. Specific details may vary for each e-mail application.

For further assistance in using CallPilot, refer to the online Help in the CallPilot Player.

What you need

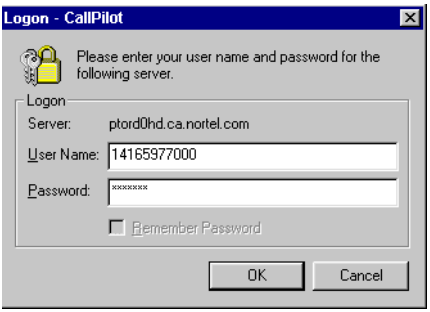
Before you start to use CallPilot, your administrator ensures that your e-mail account is correctly configured for CallPilot. Your computer must be set up according to the following requirements:

- CallPilot Player to play and record voice messages
- Nortel Fax Driver to create faxes
- Outlook Express 6.0, Outlook 2000, 2002XP, 2003 (nternet Mail mode), Netscape Messenger 6.2, 7.0, 7.1, 7.2, or Qualcomm Eudora Pro Email 6.0 and 6.1
- Windows 2000 Professional, or Windows XP Professional
- Monitor with 256-color 800 x 600 capability
- 15 Mbytes of free disk space to install software
- Sound card and speakers for playing voice messages on your computer
- Microphone connected to your computer, or a telephone situated near your computer, for recording voice messages
- LAN (Ethernet), ISDN, ADSL, or dial-up modem connection to the CallPilot server for accessing CallPilot messages
- Internet Explorer 6.0; Netscape 6.2, 7.0, 7.1, 7.2; or Mozilla 1.7.x and Mozilla FireFox 1.0 on RedHat Linux 9 Operating System to access My CallPilot

Logging in to CallPilot

When you log in to your e-mail, you can log in to CallPilot at the same time.

1. Open your Internet e-mail. You see a **CallPilot Logon/ Password** dialog box similar to the example shown.
2. If required, type your User Name/Mailbox Number.
3. In **Password**, type your CallPilot password.
4. Click **OK**.



Note: Do not leave the **Remember password** box checked on a shared computer.

To change your password the first time you log in

Your administrator can give you a password and tell you to change the password, before you log in through your Internet e-mail. To do this, log in to CallPilot from the telephone or log in to My CallPilot on your computer.

After your first login, you can change your password from the CallPilot Player. See *To change your CallPilot password*, page 30.

To log out

When you exit your e-mail application, you automatically log out of CallPilot.

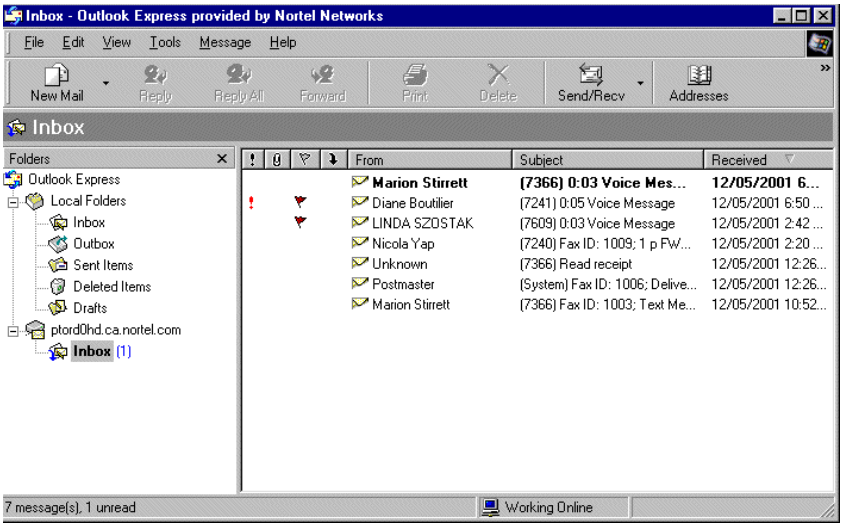
Remote login

You can log in to your mailbox from any computer that has CallPilot installed and configured in the same way as your office computer. For example, you can use a computer set up for guest access, or your home computer with a dial-up connection to the server.

Working with your CallPilot messages

When you open your e-mail with CallPilot installed, your CallPilot messages appear in your Inbox. You can open, move, copy, delete, forward, and reply to CallPilot messages, and compose new CallPilot messages, in the same way as your e-mail messages.

Your CallPilot messages


Inbox - Outlook Express provided by Nortel Networks
File Edit View Tools Message Help
New Mail Reply Reply All Forward Print Delete Send/Recv Addresses
Inbox
Folders
Outlook Express
Local Folders
Inbox
Outbox
Sent Items
Deleted Items
Drafts
ptord0hd.ca.nortel.com
Inbox (1)
From Subject Received
Marion Stirrett (7366) 0:03 Voice Mes... 12/05/2001 6...
Diane Boutilier (7241) 0:05 Voice Message 12/05/2001 6:50 ...
LINDA SZOSTAK (7609) 0:03 Voice Message 12/05/2001 2:42 ...
Nicola Yap (7240) Fax ID: 1009; 1 p FW... 12/05/2001 2:20 ...
Unknown (7366) Read receipt 12/05/2001 12:26...
Postmaster (System) Fax ID: 1006; Delive... 12/05/2001 12:26...
Marion Stirrett (7366) Fax ID: 1003; Text Me... 12/05/2001 10:52...
7 message(s), 1 unread
Working Online

To open a message

To open a CallPilot message, double-click anywhere on the message line, then double-click the voice or fax icon to open the attachment. See *Playing voice messages*, page 13, and *Viewing fax messages*, page 14.

To delete a message

Delete CallPilot messages the same way as your e-mail messages. You can delete a CallPilot message in your Inbox or in an open message.

Note: Due to a limitation in Netscape Mail, any message you delete will be deleted permanently.

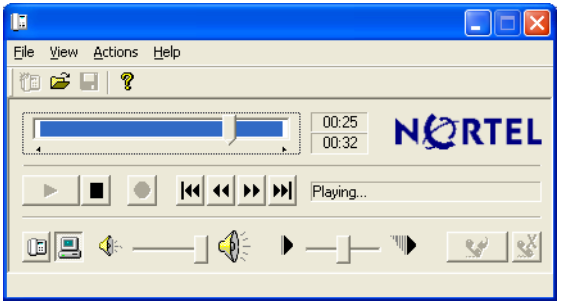
Playing voice messages

To select your telephone or computer to play voice messages

You can choose to play your voice messages from your telephone or your computer. To change the setting, or to change the telephone number that CallPilot dials, see *Changing audio settings*, page 31. You can also click the Telephone or Computer icon on the CallPilot Player to change the setting.

To play a voice message

1. Double-click the message in your Inbox, then double-click the **Voice** icon in the open message. The CallPilot Player appears.
2. Listen to the message, using the buttons on the CallPilot Player to play, stop, and re-play the message, and to go backward and forward. You can adjust the volume and speed if you are using your computer for playback. You can call the sender from your telephone.
3. You can print, delete, save, forward, and reply, the same as an e-mail.
4. When you are finished, hang up the telephone if you used the telephone, close the CallPilot Player, and close the open message.



To save a voice message as a file to use later

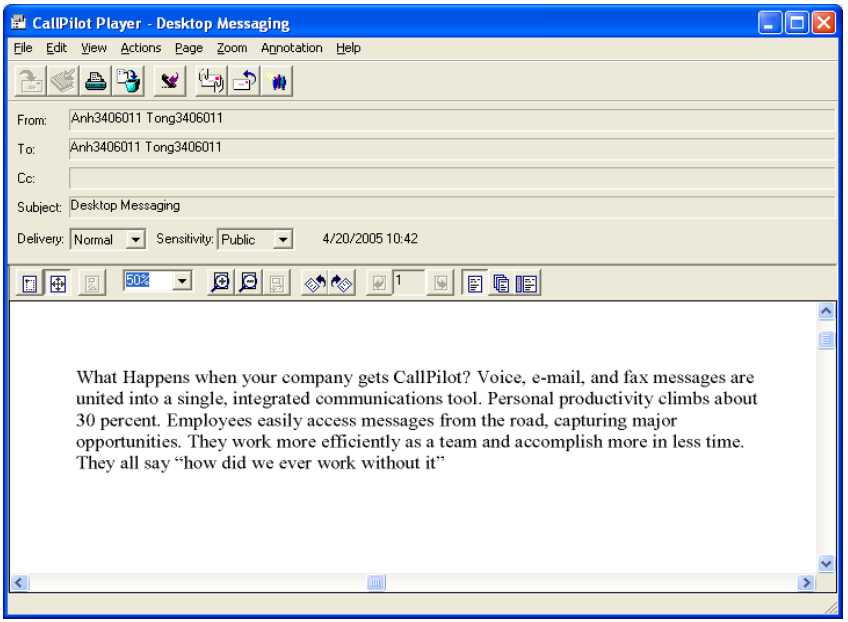
1. In an open message, right-click a voice icon, then click **Save as...**
2. In the File name box, type a name for the file, select a folder to keep the file in, then click **Save**.

Viewing fax messages

In order to receive faxes, your CallPilot administrator must enable fax capability for your mailbox.

To view a fax message

1. Double-click a fax message in your Inbox, then double-click the **fax attachment**.
2. While viewing the fax, you can enlarge or reduce the image, rotate or move, print, delete, save, forward, and reply to the fax.
3. When you are finished, close the message.


CallPilot Player - Desktop Messaging
File Edit View Actions Page Zoom Annotation Help
From: Anh3406011 Tong3406011
To: Anh3406011 Tong3406011
Cc:
Subject: Desktop Messaging
Delivery: Normal Sensitivity: Public 4/20/2005 10:42
What Happens when your company gets CallPilot? Voice, e-mail, and fax messages are united into a single, integrated communications tool. Personal productivity climbs about 30 percent. Employees easily access messages from the road, capturing major opportunities. They work more efficiently as a team and accomplish more in less time. They all say "how did we ever work without it"

Composing voice messages

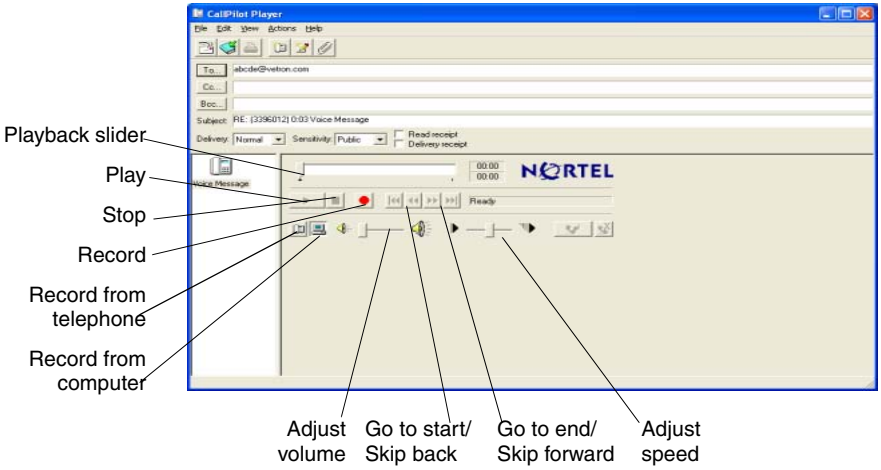
To compose and send a CallPilot voice message, you record a message and save the message as a file, then attach the file to a new message and send it. You can also save the file to send later.

To record a voice message and save the message as a file

1. Open the CallPilot Player, and click the red **Record** button.
2. Record your message.

- If you are recording from the computer, record your message into the microphone. Click **Stop** to end the recording. Click **Play** to review it. To add to the recording, click **Record**, speak again, then click **Stop**.
- If you are recording from the telephone, answer when the telephone rings. At the tone, record your message. Click **Stop** to end the recording. Click **Play** to review it.
  Hang up the telephone.

3. On the **File** menu, click **Save As...**, and type a name for the file. Save the file as a .vbk file. Click **Save**.



To send a voice message

1. Open a new message form.
2. Add a voice file as an attachment, or type text.
3. Address and send the message the same way as an e-mail.

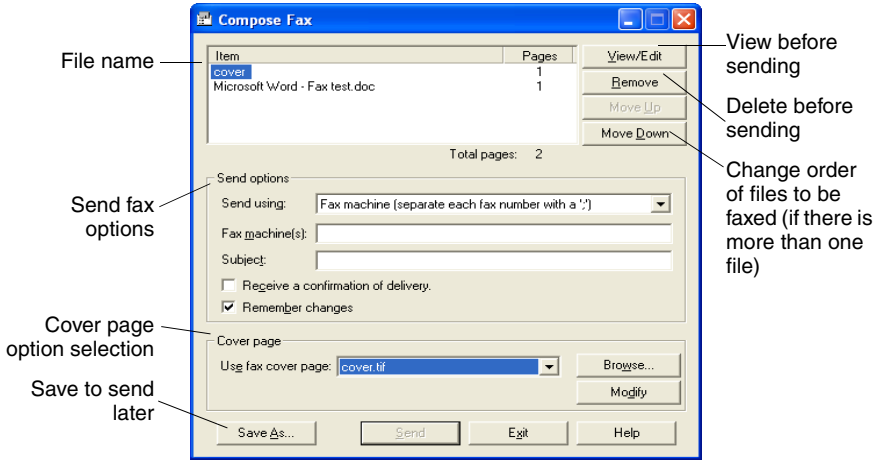
Note: Insure that rich text format (RTF) format is selected in your email client, if plain text is selected the message delivery may fail

Composing fax and text messages

To create a fax, your CallPilot mailbox must have fax capability, and your computer must have Desktop Messaging installed. CallPilot recipients of your fax must also have fax capability to view the fax on their computer. E-mail recipients do not require specific fax capability. If your recipients access their messages from their telephone, they can view the fax only by printing it. You can also send your fax to a fax machine.

To create and save a fax file

1. Open the document that you want to fax.The document must be no greater than 8.5 in. (21.5 cm) in width.
2. On the **File** menu, click **Print**.
3. From the list of printers, select **Nortel Fax**, then click **Print** or **OK**.
4. In the **Compose Fax** dialog box, click **Save As**.
5. Type a name for the file and browse to select a folder to save the file in. Save the file as a .tif file. Click **Save**.
6. In **Compose Fax**, click **Exit**.



For information on the use of cover pages in your fax, refer to the Using fax cover pages section on page 24.

To send a single fax or text message

1. In a new message form, add a fax file as an attachment, or type text. Fax files must be in .tif format.
2. Address and send the message the same way as an e-mail.

Creating and sending fax batch messages

To send customized CallPilot fax messages to multiple recipients you can use Microsoft Word Mail Merge, and send your print job to the Nortel Fax Batch printer. You must be familiar with Microsoft Word Mail Merge functionality to use this feature. Consult your Microsoft Word documentation. Note that the CallPilot Fax Batch feature is only available to CallPilot Desktop and Web users who install the Nortel Fax Batch Print Driver.

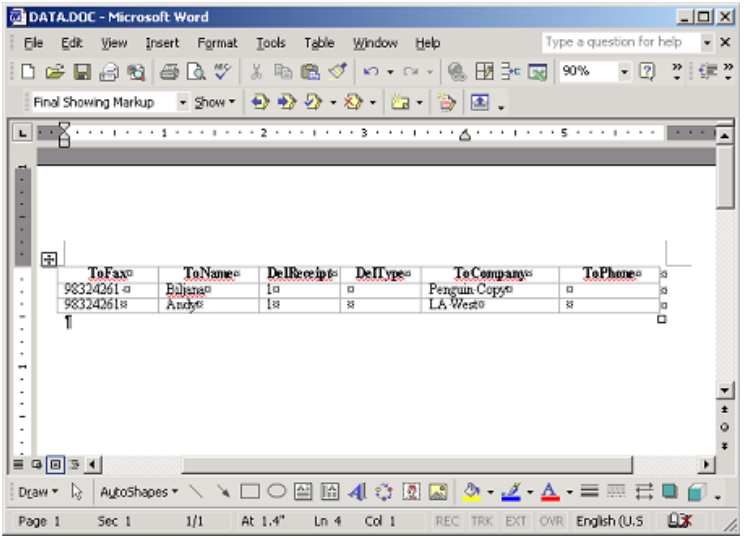
To use Mail Merge with CallPilot, you need your main document (the file you want to send to your recipients) and a data source document that contains recipient information such as names and fax numbers.

Your CallPilot Desktop Messaging installation includes a sample Microsoft Word data source named Data.doc and a sample Microsoft Word main document named Sample.doc. Each of these are examined below to explain the batch fax procedure.

Accessing and modifying the example Data source document

The Data.doc file consists of a Microsoft Word table, organized in columns, with one row for each recipient. The following column headers exist in the sample: ToFax, ToName, DelReceipt, DelType, ToCompany, and ToPhone. These column headers can be modified and deleted and new columns can be added. The column header names serve as tags, which can be inserted into the main document, to customize the fax for each recipient, or to direct CallPilot how to handle the fax.

1 Go to \Program Files\Nortel\CallPilot\fax directory and open the Data.doc file.


DATA.DOC - Microsoft Word
File Edit View Insert Format Tools Table Window Help
Type a question for help
Final Showing Markup
Show
90%
ToFax ToName DelReceipt DelType ToCompany ToPhone
98324261 Biljana Penguin Copy
98324261 Andy LA West
Draw AutoShapes
Page 1 Sec 1 1/1 At 1.4" Ln 4 Col 1 REC TRK EXT OVR English (U.S

2 Add new columns or subtract existing ones, as required. For new columns, chose a meaningful column header name.

3 Add the required data under each column header. The data source can be created by any means available to populate a Microsoft Word table, including importing information from existing files.

If you edit the recipient list using the Mail Merge utility (that is, click Edit in the Data source section of the Microsoft Mail Merge Helper), the Data Form window opens and lists all the entries from the data source table. You can add, delete, modify and search for records in this window. Any column headers that you added or modified in the data source file automatically appear in this window. Note that the **ToFax** text box is the only mandatory field for CallPilot.

The following parameters and characters are supported in the **ToFax** text box:

- Maximum supported length for the fax phone number is 120 characters.
- Numbers 0 through 9 are supported.
- Uppercase and lowercase P and the comma is used when a pause is necessary.
- The Pound sign (#) is supported.
- Common phone number symbols, such as left and right parentheses and the dash, are supported.
- Spaces are supported.
- When placed before a CallPilot mailbox number, to designate the mailbox address, the M is not case-sensitive.

The other fields are optional and are used to customize the fax or to direct CallPilot how to handle it. Three specific CallPilot fields and their parameters are:

- **ToName:** This is the fax recipient's name and can be up to 256 characters in length.
- **DelReceipt:** You can use this tag to receive a Delivery Receipt in the form of a CallPilot message in your CallPilot mailbox, when the fax is delivered to the recipient. If the DelReceipt text box is set to 1, then a delivery receipt is generated. If DelReceipt is set to 0, a delivery receipt is not generated for that recipient. If the DelReceipt text box is empty, or the field is not in Data.doc, then no delivery receipt is generated.
- **DelType:** This text box is used to set a delivery priority for each recipient. If the DelType text box is set to 0 or is left empty (or if DelType Text Box is not present in your Data.doc), the message is tagged for Normal delivery. If DelType is set to 1, then the message is tagged for Economy delivery. If DelType is set to 2, then the message is tagged for Urgent delivery. Messages sent to non-CallPilot recipients with the Delivery Type set to Economy is delivered on a schedule defined by the CallPilot server for Economy delivery. Note that messages sent to CallPilot mailboxes is not affected by the Economy designation and is sent as Normal messages. Transmission of messages tagged as Normal or Urgent is gin immediately. Urgent messages display the Urgent icon when displayed from My CallPilot

or a Desktop Messaging client and a voice prompt identifies the message as Urgent from the CallPilot telephone interface. Messages sent Urgent are treated as Normal when they are sent to non-CallPilot addresses.

4 Once the table has been updated, save all changes. You normally supply a unique name for your data file here, however; for the remainder of these procedures, the name Data.doc is used.

5 Close the document. The Data.doc file can now be used as a data source by Microsoft Mail Merge.

Accessing and modifying the example Main document

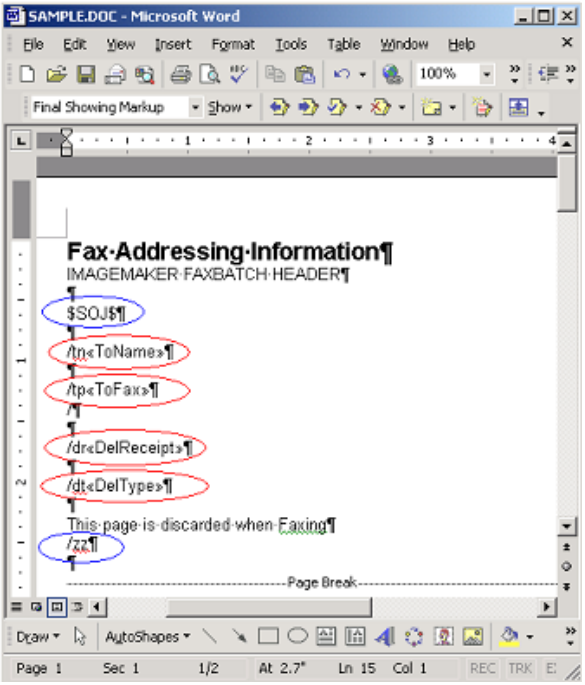
The Sample.doc file is an example of a Microsoft Word main document.

1 From the \Program Files\Nortel\CallPilot\fax directory, open Sample.doc in Microsoft Word.

This document contains tagged fields corresponding to those in the example Data.doc file. You can use this as a template for your own fax or for practice purposes. If you modify the column header names in Data.doc, you must modify them in your main document as well.

First page

The first page of the main document is a special page and does not become part of the final fax. Sample.doc is installed with the first page setup correctly.



The purpose of this page is to provide a location to map information in the data source

to each customized fax document. To signal CallPilot that this as a Fax Batch file, and to prevent this page from becoming part of the fax, two special control codes **must** be present on the first page:

SOJ	Start of Job, signals the fax driver to start processing, and can be placed anywhere on the first page.
/zz	Start this page, prevents the first page from becoming part of the fax message, and can be placed anywhere on the first page.

The CallPilot Desktop software retrieves the Fax Number from the first page of the document. Additionally, CallPilot Desktop software retrieves the Recipient Name, the Delivery Receipt, and the Delivery Type, if they exist on the first page.

/tp	Fax Number, is used to address the message. **This text box is required.**
/dr	Delivery Receipt, is turned on or off for each recipient. **This text box is optional.**
/tn	Name of Recipient, is used to identify the record in the Nortel Fax Batch Status dialog if the fax number is either missing or invalid. **This text box is optional.**
/dt	Delivery Type, is used to mark messages for Normal, Economy or Urgent delivery. **This text box is optional.**

To complete the page, the Fax Number column header (that is, <<ToFax>) must be inserted after the /tp control using the Mail Merge insert function. Also, the Delivery Receipt column header (that is, <<DelReceipt>>) can be inserted after the /dr control, the Name of Recipient text box (that is, <<ToName>>) can be inserted after the /tn control, and the Delivery Type text box (that is, <<DelType>>) can be inserted after the /dt control.

Note: all Fax Batch controls are case sensitive.

As an advanced fax addressing feature, users can also modify all data in a single column, without actually modifying the data source file. For example, if an existing data source table contains fax numbers for a large number of recipients, but the external access number 9 is missing, this number can be added to all fax numbers by modifying the control on the first page of the document as follows:

/tp9<<ToFax>>

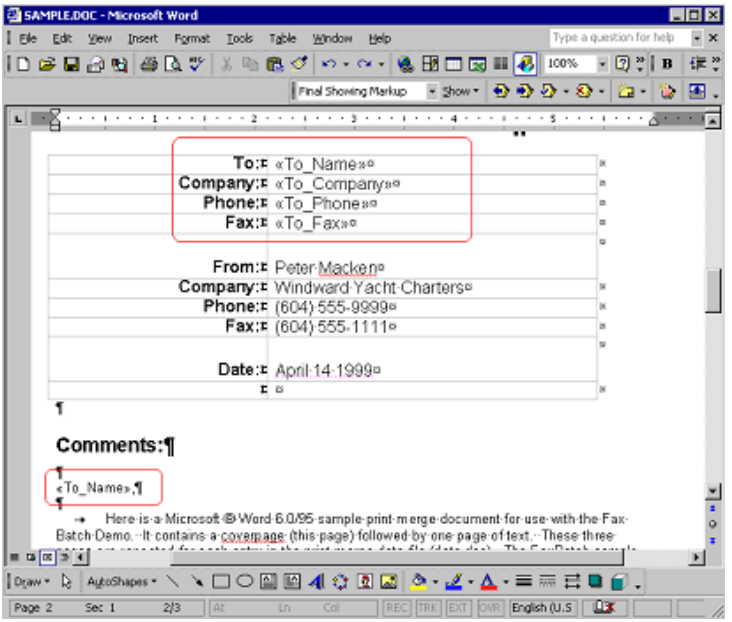
In this example, a 9 is added to the beginning of each phone number during fax batch processing. The data source remains unchanged, and can be used from a different location that does not require a 9 for external access.

Second page

Once the data source document and the first page of the main document are created, you can begin to customize your fax.

Note: The page must be equal to, or less than 8.5 inches in width.

You can use all of the data source column header tags to customize the document. The following is an example using the Sample.doc file:


SAMPLE.DOC - Microsoft Word
To: «To_Name»
Company: «To_Company»
Phone: «To_Phone»
Fax: «To_Fax»
From: Peter Macken
Company: Windward Yacht Charters
Phone: (604) 555-9999
Fax: (604) 555-1111
Date: April 14 1999
Comments:
«To_Name»,
Here is a Microsoft® Word 6.0/95 sample print merge document for use with the Fax Batch Demo. It contains a coverpage (this page) followed by one page of text. These three

In this example, the document is customized for each recipient. Data source column headers are inserted into the document using the Microsoft Word Mail Merge utility Insert function. After the main document is customized, the document is ready to be merged with the information in the Data.doc file. Consult your Microsoft Word Mail Merge help for more details on inserting data source text boxes into the document.

Merging data from the Data Source into the Main Document

When you are ready to merge data from the data source file into your main document:

1. Start **Mail Merge** from the Microsoft Word **Tools** menu. Depending on which version of Microsoft Word you are using, Mail Merge is under different menu headings.
   a. In the Office XP version, select **Tools> Letters and Mailings> Mail Merge Wizard**.
   b. In Office 2000 select **Tools> Mail Merge.**
2. Verify that Sample.doc is currently selected as the main document, and that Data.doc is currently selected as the data source.

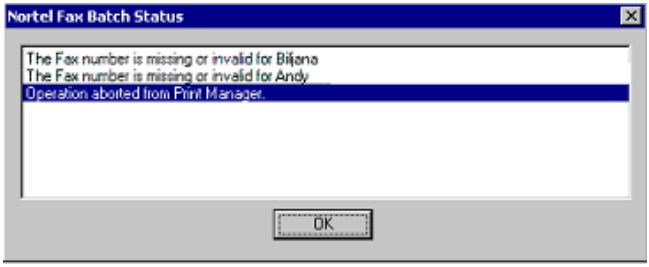
3 Select **Merge to Printer** and then select the **Nortel Fax Batch** driver from the **Print** dialog box that appears.
Note: Ensure that Microsoft Word is not set up to print pages in reverse order.

4 Click **OK** in the Print dialog box to initiate the batch fax process.

When the document is merged, data values from the data source file are merged into the main document at the appropriate tag positions and a separate fax TIF file for each recipient is created. CallPilot Desktop software addresses and transfers the fax files to the server. The CallPilot server is responsible for sending the fax to the recipients.

Once the process starts, the **Print Status** dialog box appears. The page number increases incrementally as each page is converted to a TIF file. Since the first page is skipped, this page is not included in the count. For example, if a three-page fax is sent to ten recipients, the dialog box displays "Printing page 1," "Printing page 2," and continues up to "Printing page 20." Only 20 pages are printed, because the first page of each document is skipped.

Problems that occur while creating the fax images, or with the fax addresses, are displayed in a separate Nortel Fax Batch Status dialog box:


Nortel Fax Batch Status
The Fax number is missing or invalid for Biljana
The Fax number is missing or invalid for Andy
Operation aborted from Print Manager.
OK

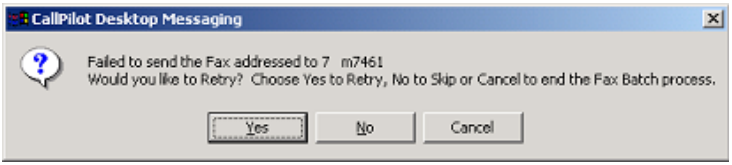
Problems, such as a missing fax address or an unsupported fax address format, are checked. However, problems such as a wrong fax number is not identified, provided the number is in a valid format. A wrong fax number, however, results in the sending of a non-Delivery receipt to the user's CallPilot mailbox by the CallPilot server.

When you click the **OK** button, the batch process ends, and no faxes are sent. You must fix the fax addresses, and resubmit the job.

If all faxes and addresses are created properly, a dialog box appears while the faxes are being addressed and transferred to the CallPilot Server. The Nortel Fax Batch Status dialog box indicates the status of the batch job. If you press **Cancel** in this dialog box before the job is completed, another dialog box appears, asking you to confirm the cancellation. If you select Yes, all temporary files are deleted, and the process ends. However, all faxes that are already transferred to the CallPilot server are sent.

If a problem occurs while transferring the fax, a dialog box similar to the following

appears:


CallPilot Desktop Messaging
Failed to send the Fax addressed to 7 m7461
Would you like to Retry? Choose Yes to Retry, No to Skip or Cancel to end the Fax Batch process.
Yes
No
Cancel

If you select Yes, an attempt is made to resend the fax to the server. If you select No, the current fax is skipped, and processing begins on the next fax in the list. The skipped fax is not sent. If you select Cancel, another dialog box appears, asking you to confirm the cancellation. If you choose Yes, all temporary files are deleted, and the process ends. Any faxes already transferred to the CallPilot server are sent. If you choose No, the failure dialog box shown above is displayed again, allowing you to make a different choice.

A confirmation dialog box appears once all faxes have been submitted to the server.

Using fax cover pages

Callpilot DM Internet clients can choose to include a cover page with their faxes. The server administrator typically designs and manages these cover pages. The user simply chooses the desired style of cover page (if more than one is available).

Cover pages created with these tools include the following information:

From Information:	Title	Name	Department	Company
	Phone number		Fax number	
To Information:	Title	Name	Department	Company
	Phone number		Fax number	

Number of Pages

Sent Date & Time

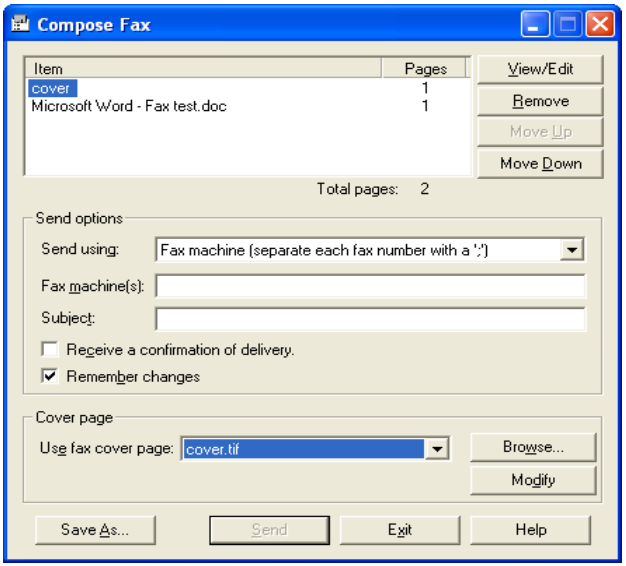
A Cover Sheet Memo section

Nortel Fax Printer Driver form

You can use the Nortel Fax Printer form to send a fax message using either a CallPilot Desktop messaging client (such as Microsoft Outlook Express) or the QuickFax feature. QuickFax allows you to send a fax directly from the **print** dialog box. If you choose to send your fax using a CallPilot Desktop Messaging client, the cover page is available from the CallPilot Custom form

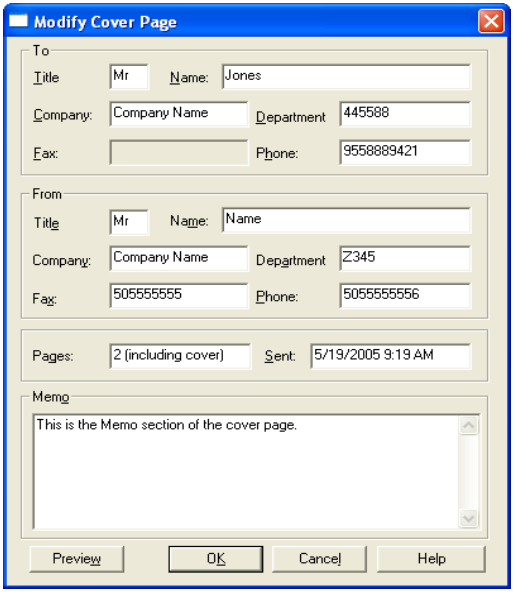
f you choose to send your fax to a specific destination (for example, a fax machine), the Cover page text box becomes active and lets you browse for a cover page and select one from the drop-down list. You can then modify the cover page contents. You can also choose not to include a cover page by selecting the **No cover page** option from the **Use fax cover page** drop-down list.

Note that you can also include a Subject line here. The Subject line information appears in the e-mail portion of the fax, but not on the hard copy of the fax.

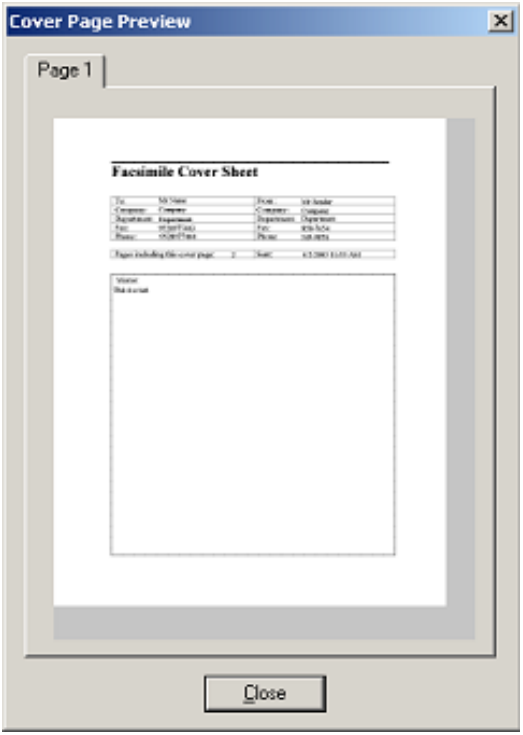


Modify and Preview cover page

You can preview the current cover page and modify its contents by clicking the Modify button in the Nortel Fax Printer driver window.



Click on **Preview** to view the current state of the cover page.



The first time you access this page, CallPilot Desktop Messaging attempts to fill in the From section using information from the registry. Desktop Messaging remembers the data that you entered into this section, and automatically complete those text boxes the next time you use this page. Although the From information is automatically populated from the registry, you can still change it.

In the **To** section, the Fax text box is always read-only. CallPilot populates the Fax field using address information from the Fax driver forms. The **Name** text box is left empty for you to complete.

CallPilot Desktop Messaging computes the number of pages (including the cover page) and enters this information in the **Pages** field.

The **Sent** field uses the current time and date by default. This field is also editable.

The **Memo** section is populated from the Memo section of the Modify cover page form.

Note: The maximum length of the Memo text box is 2500 characters. The maximum length of the other cover page text boxes is 30 characters.

Addressing messages

To address a message from an Address Book

You can address a CallPilot message from the CallPilot Address Book on the server, or from the e-mail Address Book on your computer or on the server. Address CallPilot messages the same way as your e-mail messages.

- The CallPilot Address Book on the server is maintained by your organization, and contains the addresses of the CallPilot users and distribution lists that you are allowed to use. You cannot edit this list.
- If you maintain a personal Address Book of e-mail addresses, you can add CallPilot addresses to this list.

To add CallPilot addresses to your personal Address Book

If you have an e-mail personal Address Book on your computer, you can add CallPilot addresses and distribution lists to it. Add CallPilot addresses the same way as e-mail addresses. You may want to distinguish between CallPilot and e-mail addresses by adding CallPilot after the recipient's name.

To address a message manually

You can type an address directly into the To text box of a new message.

Required format for a CallPilot E-mail address

If you choose to enter a CallPilot addresses in the E-mail text box, the address must be entered in the following format:

XXXXYYYY@ZZZZ

Where:
XXXX = SMTP/VPIM prefix
YYYY = CallPilot Mailbox number
ZZZZ = CallPilot Server FQDN (server and domain)

For example, suppose CallPilot server "na42349" in the domain "us.nortel.com" with VPIM/SMTP prefix "1952897" contains mailbox "7404". Then the CallPilot address for that mailbox would be:

19528977404@na42349.us.nortel.com

Message Forwarding Rule feature

The Message Forwarding Rule can be configured by the system administrator or by the My CallPilot user. The Message Forwarding Rule feature enables you to automatically forward some or all of your CallPilot messages to an address configured by the system administrator. The user must enable the Message Forwarding Rule. If a message cannot be delivered the Message Forwarding Rule is disabled. Once the user receives notice of the undeliverable message, the Message Forwarding Rule, must again be enabled.

Users receive messages forwarded to CallPilot accounts within their configured CallPilot e-mail client. The forwarded message are accessible from the CallPilot Telephone user interface or from the desktop.

Note: In order to enable or disable Message Forwarding Rule from the desktop client interface you use your account information in the Address Book advanced section and not an anonymous log on.

Note: If the Exchange 6.5 server is used for outgoing SMTP messages, messages are not marked as Read when they are opened by the recipient because the Read Receipt does not get sent back to CallPilot. You should either use **Forwarded by this Service** option or turn off **Mark original message as Read** option when configuring Message Forwarding Rules.

IMAP Clients

Users can access their IMAP client from a Windows, Macintosh or Linux computer. The IMAP client can be used to access CallPilot messages directly by connecting to a CallPilot server or to a third party e-mail server. Forwarded CallPilot messages are displayed with e-mail icons, and the standard e-mail form associated with their e-mail client are used to display the message. Windows and Macintosh 9.0, 9.1 users have the option of installing the CallPilot player and receiving their messages in VBK format.

Note that not all e-mail servers support Read Receipt. Read Receipt is required to support the "Mark original message as read when Forwarded message is opened by recipient" selection. So, if the e-mail server does not support Read Receipt, then the user should choose one of the other options to mark original message as read.

Note also that not all Linux fax viewing applications support viewing multiple pages. Some popular programs that are pre-installed with Red Hat 9.0 that do not work include "The Gimp", "gThumb", "Eye of Gnome", "GQView", and "Ghostview."

There are at least three relatively popular Linux utilities that do support viewing multi-page faxes. They are:

- mgetty-viewfax
- Image Magick
- The fax viewer component of KDE (aka "KFax")

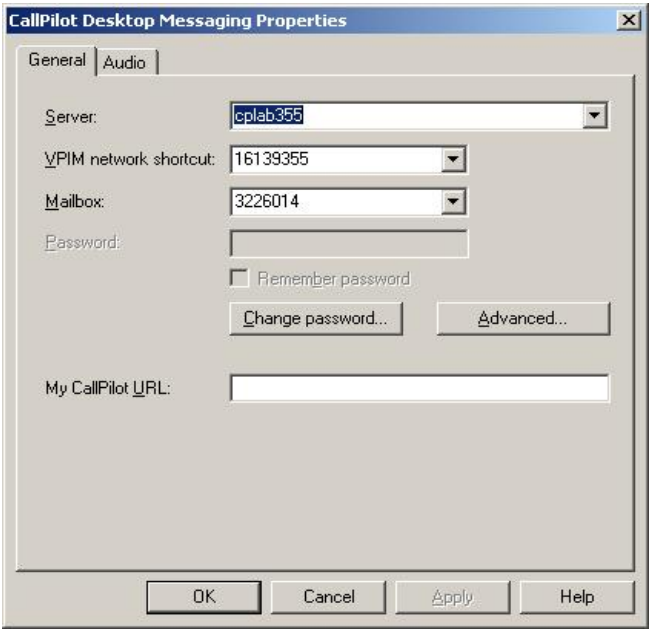
For the Macintosh, the built in fax viewer for Mac 9.x can only display the first page of a fax. The built in fax viewer for Mac X can display all pages of the fax.

Changing your mailbox settings

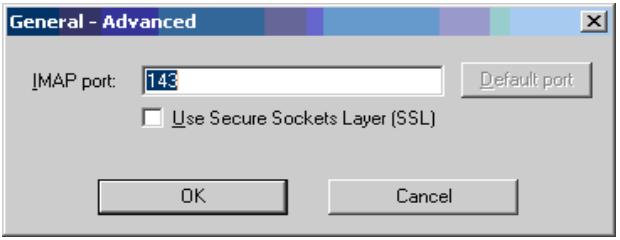
To view or change your CallPilot access settings

Your administrator enters the default CallPilot access information for you. You can change these settings if required. Refer to the online Help in the CallPilot Player for detailed explanation.

1. On the CallPilot Player, select **View > Options**.
2. Click the **General** tab to display your current access settings.
   - Uncheck **Remember Password** if you are using a shared computer.
3. Make any changes required, then click **OK**.



When you click on the **Advanced** button, you see the following dialog box, here you can change an IMAP port or specify SSL.



To change your CallPilot password

This is the same password that you use from the telephone.

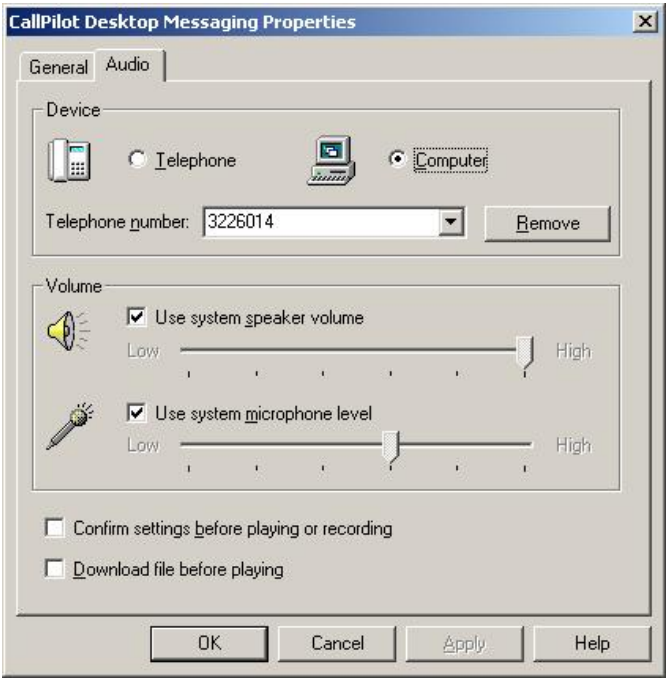
1. Repeat steps 1 and 2 above, then click **Change Password**.
2. In the **Old password** text box, type your current password.
3. In the **New password** text box, type your new password.
4. In the **Retype new** text box, type your new password again.
5. Click **OK** to save the change.
6. Click **OK** to exit the General settings.

Changing audio settings

To change the audio device and volume

You can play and record your messages from your telephone or your computer.

1. On the CallPilot Player, select **View > Options**.
2. Click the **Audio** tab to display the current Audio settings.



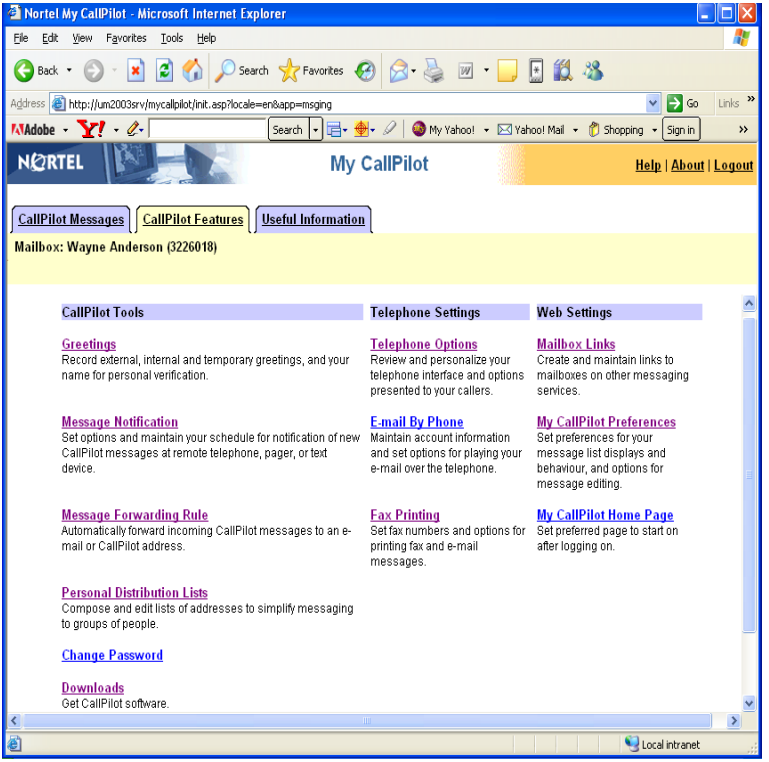
3. In **Device**, click **Telephone** if you want to play and record your voice messages from your telephone. Make sure the correct telephone number appears.
   Or, click **Computer** if you want to play and record your voice messages through your computer's speakers and microphone.
4. In **Volume**, check the two **Volume** check boxes if you want to coordinate your CallPilot volume settings with your computer's speaker and microphone volumes.
5. If you want a reminder to check these settings before playing or recording voice messages, check **Confirm settings...**
6. Click **OK**.

Using My CallPilot

If the web-based resources of My CallPilot are available for your mailbox, your administrator provides you with the URL. For more information on My CallPilot, refer to the *My CallPilot User Guide*.

To view or change your CallPilot feature settings

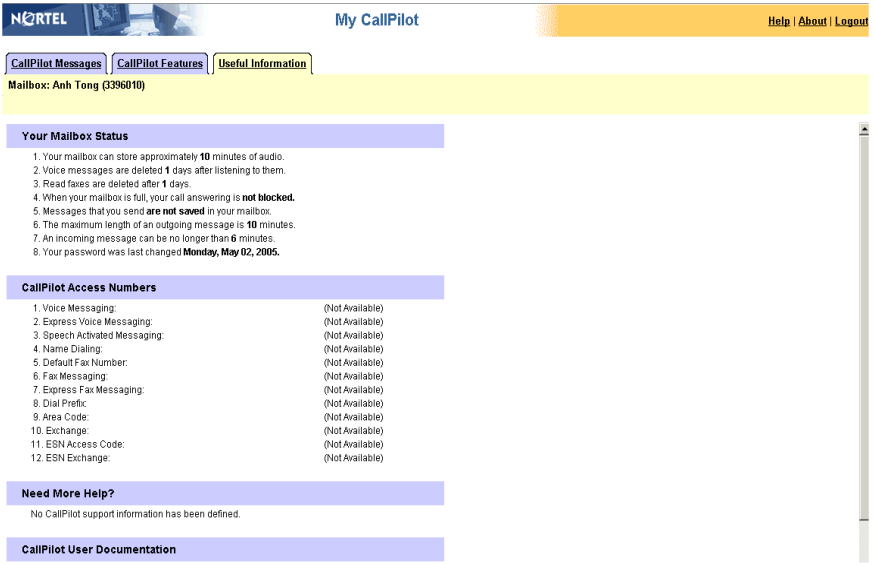
1. In My CallPilot, click the **CallPilot Features** tab.
2. Select any feature and make changes to your setup as required. Any changes you make to a feature go into effect immediately whether you use CallPilot from your computer or from your telephone.


Nortel My CallPilot - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://um2003srv/mycallpilot/init.asp?locale=en&app=msging
Go Links
Adobe Search My Yahoo! Yahoo! Mail Shopping Sign in
NORTEL
My CallPilot
Help | About | Logout
CallPilot Messages
CallPilot Features
Useful Information
Mailbox: Wayne Anderson (3226018)
CallPilot Tools
Greetings
Record external, internal and temporary greetings, and your name for personal verification.
Message Notification
Set options and maintain your schedule for notification of new CallPilot messages at remote telephone, pager, or text device.
Message Forwarding Rule
Automatically forward incoming CallPilot messages to an e-mail or CallPilot address.
Personal Distribution Lists
Compose and edit lists of addresses to simplify messaging to groups of people.
Change Password
Downloads
Get CallPilot software.
Telephone Settings
Telephone Options
Review and personalize your telephone interface and options presented to your callers.
E-mail By Phone
Maintain account information and set options for playing your e-mail over the telephone.
Fax Printing
Set fax numbers and options for printing fax and e-mail messages.
Web Settings
Mailbox Links
Create and maintain links to mailboxes on other messaging services.
My CallPilot Preferences
Set preferences for your message list displays and behaviour, and options for message editing.
My CallPilot Home Page
Set preferred page to start on after logging on.
Local intranet

To view user information

In My CallPilot, click the **Useful Information** tab to view online user information

specific to your mailbox.


My CallPilot
Help | About | Logout
CallPilot Messages
CallPilot Features
Useful Information
Mailbox: Anh Tong (3396010)
Your Mailbox Status
1. Your mailbox can store approximately 10 minutes of audio.
2. Voice messages are deleted 1 days after listening to them.
3. Read faxes are deleted after 1 days.
4. When your mailbox is full, your call answering is not blocked.
5. Messages that you send are not saved in your mailbox.
6. The maximum length of an outgoing message is 10 minutes.
7. An incoming message can be no longer than 6 minutes.
8. Your password was last changed Monday, May 02, 2005.
CallPilot Access Numbers
1. Voice Messaging: (Not Available)
2. Express Voice Messaging: (Not Available)
3. Speech Activated Messaging: (Not Available)
4. Name Dialing: (Not Available)
5. Default Fax Number: (Not Available)
6. Fax Messaging: (Not Available)
7. Express Fax Messaging: (Not Available)
8. Dial Prefix: (Not Available)
9. Area Code: (Not Available)
10. Exchange: (Not Available)
11. ESN Access Code: (Not Available)
12. ESN Exchange: (Not Available)
Need More Help?
No CallPilot support information has been defined.
CallPilot User Documentation

CallPilot Desktop Messaging User Guide
for Internet Clients

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